

Form OR-243

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Oregon Department of Revenue



Office use only
Date received

Claim to Refund Due a Deceased Person

Submit original form—do not submit photocopy

For calendar year(s) [] [] []

Decedent and Claimant information table including names, SSN, date of death, and addresses.

- 1. Has a personal representative for the estate been appointed by the court?
2. Has a small-estate affidavit been filed with the county clerk?
3. Has the probate or small estate closed?
4. If the estate is to be probated, I am filing this statement as a (check one box only):
(a) Personal representative of estate.
(b) Responsible party filing affidavit for a small estate.

For nonprobated or closed estates

- 5. Does the total due the decedent (except for salary or wages) from all state of Oregon agencies exceed \$10,000?
6. If the estate isn't to be probated or probate has closed, I qualify for payment under one of the following kinship groups (check one box only):
Surviving spouse or registered domestic partner.
Trustee of a revocable inter vivos trust created by the decedent.
Children of the decedent or children of the decedent's deceased child.
Parents of the decedent. Brothers and/or sisters of the decedent.
Nephews and/or nieces of the decedent.

Revenue Finance use only

Attach a photocopy of the death certificate.
If you have the original refund check, send it back with this form.

Signature and verification

I promise to use all of the money to pay the expenses of the last illness and funeral of the decedent if necessary. If, after payment of the check by the state treasurer, the decedent's estate is probated, I promise to account fully to the personal representative. If nonprobated, I promise to account fully to other persons entitled to share in this refund. I understand that the state of Oregon isn't responsible for such accounting. I declare that there are no family members who are more closely related to the decedent. I declare under the penalties of false swearing that the statements herein are true.

Claimant signature and Date fields